Task Title: Create a Budget Template

Learner Name:
Date Started: **Date Completed:**
Successful Completion: Yes___   No___
Goal Path: Employment_✓_ Apprenticeship___ Secondary School___ Post Secondary ___ Independence___
Task Description: Creating a budget template with sub-categories for expenses and income

Competency: B: Communicate Ideas and Information	**Task Group(s):** B3: Complete and create documents

Level Indicators: B3.3b: Create more complex documents to sort, display and organize information
Performance Descriptors: see chart on last page or click here
Links to skill building activities: see the last page or click here

Materials Required:
- Paper, pencil/pen
- This task set could be added as Digital Technology (D3) if you have the learner create the document on either an Excel spreadsheet or as a table in Word
- If done by paper instructor may wish to make sure it is done using lined paper to keep the rows clear

ESKARGO:

Skills and Knowledge Required for Successful Task Performance
- Draws from multiple sources as required (i.e., other documents and texts)
- Manages unfamiliar elements (vocabulary, context, topic) to complete the task

Creates Documents
- Follows conventions to display information in more complex documents (e.g., use of

abbreviations, symbols)
- Sorts entries into categories and subcategories
- Displays many categories of information
- Organizes information in a variety of ways
- Identifies parts of documents using titles, row and column headings, sub-headings, and labels
- Creates documents using titles, row and column headings, sub-headings, or sub parts
- Creates a budget template
- Tries a variety of displays of the same data using computer applications, and selects the type of graph that best represents the data

Attitudes:

Practitioner,

We encourage you to talk with the learner about attitudes required to complete this task set. The context of the task has to be considered when identifying attitudes. With your learner, please check one of the following:

□ Attitude is not important   □ Attitude is somewhat important   □ Attitude is very important

Task Title: Create a Budget Template

Managers and other supervisory positions can be required to develop an annual budget for their department or create a budget for particular projects. Creating a budget template (a document without dollar figures) is the step before filling in the figures. Look at the "Project Budget Outline".

Learner Information and Tasks:

Task 1:   Create a budget template that includes the headings: Budget, Actual and Difference for the budget categories and sub-categories found in the "Project Budget Outline".

Task Title: Create a Budget Template

Project Budget Outline

The Team Manager has been given a one year project to develop better team work protocols at the workplace. The Manager has a team of 5 people, including herself. They brainstorm a list of items they will need to include in a budget. The following are the items:

Income:

- Project Funded Amount

Expenses:

- 20 hours per week of each person's staff time for one year (each team member makes the same wage and the Team Manager is the only one with a different wage rate)

- Office supplies – paper, pens, miscellaneous

- Equipment – 2 laptops and 1 laptop projector

- Online survey (e.g. Survey Monkey)

- Communications – internet, cell phones, conference calls

- Promotions and outreach to staff – posters, etc.

- Honorariums for field tests – two groups of 4 volunteers each

- Resources

- Desktop Publishing and editing of final report

- Printing of final report

- Project evaluation

- Administrative Fee (helps to cover other staff and costs that are indirectly related to the project)

Task Title: Create a Budget Template

Answer Key

Task 1:   The budget should be a table format….looking similar to this:

	Budget	**Actual**	**Difference**
Income			
-Project Funded Amount			
Total Income			
Expenses			
-Wages			
-4 x 20hr x $ /hr x 52 weeks			
-1 x 20hr x $ /hr x 52 weeks			
-Office Supplies			
-Paper			
-Pens			
-Miscellaneous			
-Equipment			
-2 laptops			
-laptop projector			
Online Survey – Survey Monkey			
Communications			
-internet			
-cell phones			
-conference calls			

Promotions and Outreach to Staff – posters, etc.			
Honourariums for fieldtests			
-2 x 4 x $			
Resources			
Desktop Publishing of final report			
Editing of final report			
Printing of final report			
Project Evaluation			
Administrative Fee			
Total Expenses			

Task Title: Create a Budget Template

Performance Descriptors	Needs Work	Completes task with support from practitioner	Completes task independently
B3.3 • follows conventions to display information in more complex documents (e.g. use of abbreviations, symbols)			
• sorts entries into categories and subcategories			
• displays many categories of information			
• identifies parts of documents using titles, row and column headings, sub-headings and labels			

This task: was successfully completed___   needs to be tried again___

Learner Comments

_____   _____

Instructor (print)   **Learner Signature**

Skill Building Activities

Links to online resources:

- **Money math**

Pages 6 – 8 table format worksheets to compare income and expenses using addition, subtraction and multiplication

Pages 9 – 10 circle graph worksheet exercise to show what percent of income each expense uses. Percentage, graphing, addition and subtraction skills used.

Pages 11 – 12 Sorting expenses into 5 categories and adding to a circle graph. Percentage, graphing, and addition skills used.

Page 14 – 16 Document use worksheet using Time cards. Multiplication & Addition skills used.

http://www.nwt.literacy.ca/resources/adultlit/everyday_math/money_math_wrkbk.pdf

- **The Learning Edge**

OALCF ESKARGO B3 Document use tasks for Employment pathway.

http://thewclc.ca/edge/issue6/index1.html Learning activities with Paychecks, Statement of Earnings and Workplace Schedules.

- **GCF Learnfree.org**

- Practise completing tables -Google Docs Spreadsheet basics -

http://www.gcflearnfree.org/googlespreadsheets

-Interactive document use lesson to determine a safe route use a floor plan-

http://www.gcflearnfree.org/healthandsafety/fire-plan

- **Khan Academy**

-How to make a Scale drawings

https://www.khanacademy.org/math/basic-geo/basic-geo-area-perimeter/basic-geo-scale-drawings/v/constructing-scale-drawings

-Practice constructing scale drawing

https://www.khanacademy.org/math/basic-geo/basic-geo-area-perimeter/basic-geo-scale-drawings/e/constructing-scale-drawings

- **Creating a bar graph**

https://www.khanacademy.org/math/pre-algebra/applying-math-reasoning-topic/reading_data/v/creating-bar-charts-1

LearningHUB online courses available:

- **Essential Skills, Independent Study (assigned by practitioner after assessment)**

  o Document Use Level 3, Assignment 1,2 (Access online platform to decide what, where and how to enter information in complex charts and graphs.)

- **Independent Study, Short Courses (assigned by practitioner after assessment)**
    - Managing Your Money (create a budget task)
    - Understanding Excel 2007 Spreadsheets (create spreadsheets)

- **Live Classes (SABA)** – Budgeting Basics

*To access LearningHUB courses, learners must register for the LearningHUB e-Channel program by completing the registration form on their website and completing the course selection (page 2 of the registration form): https://www.learninghub.ca/get_registered.aspx

*To Access LearningHUB Course Catalogue:
http://www.learninghub.ca/Files/PDF-files/HUBcoursecatalogue,%20December%2023,%202014%20revision.pdf